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professionally, so that your new year can be a time for new journeys and endeavors. When you look back at your past year, you can see how your work paid off and how ...

Amy Vetter • Jan. 03, 2022



Reflecting on 2021

Working in the accounting profession, it is important to reflect on and set goals. The end of the year is the perfect time to reflect on the past year and look to the year ahead. Make your expectations clear so you are never unsure of where you are or if you are succeeding in your role.

Let the beginning of the year be a time of self-reflection, both personally and

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In all honesty, you should be checking in with yourself more than just at the end of the year, but if there is any time that is the best, the end of the year is it. Evaluate your own work, personally and professionally, and take ownership of your observations. Remember when checking in on the year prior, think about:

Highlights

This is a big one! Think about each month of 2021 individually. What is one **highlight** or accomplishment from every month? Then think of the larger picture. What was your most significant achievement for the year?

Keep a “brag file” of emails, messages, or communications that recognize your hard work. Or you can keep customer testimonials and other physical reminders of a job well done that you produced throughout the year. Keeping a record of kudos and appreciation has the benefit of backing up your value when meeting with potential clients or employers.

Use your calendar if you need a little reminder of what you did or accomplished. You will be able to highlight the best of what you did throughout the year. Remember, celebrating even the small wins is important.

Lessons learned

When reflecting on the past year, you also want to consider lessons you learned (sometimes the hard way.) Based on what you have learned, will you do anything differently in the coming year? Maybe you developed a bad habit (or two... the pandemic can do that to you.) Try replacing your negative learned behaviors with positive ones. It may be slow going, but just take it one day at a time.

Looking at and evaluating your own failures can be tough, but you should always observe, learn, and pivot when needed. The best way to do that is to recognize the areas you need to work on to grow and be ready for similar situations in the future.

What is the status of your goals?

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you just tweaked them a bit. Whatever your goals are, they should be adaptable so you can stay on target for success.

Listed below are things to consider when planning goals for the year ahead:

Set goals that motivate you

When setting goals, you should have a defined outcome, and your goal should be something that truly motivates you. Yes, you may want to accomplish something broad like bringing in more income, but how will you achieve that goal? Will it be through client interactions or expanding into new markets?

Write down why you chose your specific goal and how it benefits yourself and your business. Once you know why you set the goal you set, it will make you more committed to achieving said goal.

Be specific

An effective way to set goals for accountants that also motivate is to set [S.M.A.R.T. goals](#). S.M.A.R.T. goals are: specific, measurable, attainable, relevant, and timely. The SMART approach helps you define your goals to more easily attain them.

How will you go about achieving your goals? Write out the individual tasks and goals you need to complete, including things like supplies, budget, and personnel. Be detailed. It's better to have too much information and cut back than have too little.

Set up daily, weekly, or monthly reminders to stay on track with your goals. Monitor your progress regularly—this ensures you stay on target and helps you identify changes or adjustments to make.

Areas to develop

Even if your job is secure, you should still assess what you could be doing better for

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By checking in with yourself and defining the year ahead, you'll become more aware and agile, so you can quickly pivot when needed to jump on new opportunities and create more business success.

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Amy Vetter is a CPA.CITP, CGMA is an accomplished c-suite executive and board member with deep experience in cloud technology and transformation, creating go-to-market (GTM) strategies to scale businesses nationally and internationally. Amy has held multiple roles in Fortune 500, startup, small company rapid growth, and is a serial entrepreneur. She is well-versed in overseeing marketing, sales, customer programs, and education. Amy is also an active member of the AICPA IMTA Executive Committee where she leads the Technology Innovations Taskforce and is an AICPA CITP Champion.

Amy is a sought-after speaker, panelist, and authors articles for many national publications and online journals. Amy has inspired thousands using her experiential knowledge on the digital transformation journey, where she provides guidance on how to move to cloud technology, and also the change management necessary to be successful. As a cloud technology expert, Amy authored Integrative Advisory Services: Expanding Your Accounting Services Beyond the Cloud, published by Wiley, where she provides the skills needed to transform digitally to take advantage of cloud technology and create advisory services to offer business clients. She also published the book, Business, Balance, & Bliss: How the B³ Method Can Transform Your Career and Life. Amy is a veteran speaker whose TEDx Talk continues to motivate viewers to take a more human approach to business in this digital world.

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